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AUTHOR Baggett, David
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ABSTRACT

For model postsecondary demonstration projects serving individuals with disabilities, a portfolio of project activities may serve as a method for program evaluation, program replication, and program planning. Using a portfolio for collecting, describing, and documenting a project's successes, efforts, and failures enables project staff to take stock of their accomplishments to date, track their progress towards reaching goals, and foster an awareness of the fullness of their efforts. Qualitative and quantitative analysis of a portfolio of activities can involve staff in conducting their own evaluations, which apply a basic concept of empowerment evaluation. Portfolio components should include a summary of the portfolio's format and purpose, a narrative of the grant, grant personnel, a copy of the original grant, a list of the project's goals and objectives, formal and informal program evaluations, consumer needs assessments, research activities, outreach activities, network activities, professional meetings and activities, dissemination activities, and planning activities. The benefits of using portfolios are discussed. (Contains 11 references.) (JDD)

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Using a Project Portfolio: Empowerment Evaluation for Model Demonstration Projects

David Baggett
University of Massachusetts at Amherst

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Authors' Note

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Using Project Portfolios: Empowerment Evaluation for Model Demonstration Projects

An educational portfolio is a purposely selected sample of materials from a body of work or of activities from a project generated during the instructional process for the purpose of demonstrating effort, progress, or achievement. A consortium of educators defined a portfolio as "a purposeful collection of student work that tells the story of a student's efforts, progress, or achievement in (a) given area(s). This collection must include: guidelines for selecting content; and evidence of student self-reflection" (Arter, 1992). Portfolios are widely used for showcasing the creative performance of a student in art, music, or writing. More recently, portfolios have been adopted in elementary schools as an additional means for assessing students' comprehensive academic progress (McRobbie, 1992; Gelfer, 1993).

Portfolios may also serve as a method for program evaluation. For model postsecondary demonstration projects, the purpose of a portfolio is to use an evolutionary format for recording the works of a grant. A portfolio of project activities can provide interested individuals with a complete and comprehensive record of the range and scope of a grant's activities over time (Grace, 1992), while also serving to empower project staff through evaluative information (McRobbie, 1992). The use of a portfolio for documenting and describing a project's successes, efforts, and failures (Collins, 1992) will enable project staff to take stock of their accomplishments to date, track their progress towards reaching stated goals or objectives (Paulson & Paulson, 1991b), and foster an awareness of the fullness of their efforts (Arter, 1992).

A portfolio of project activities is an action-oriented process that allows staff to conduct a continuous, thorough, self-determining evaluation (Court & McInerney, 1993; Graves & Sunstein, 1992; McRobbie, 1992). This historical record of the grant may prove especially useful for individuals who are beginning new projects or who may wish to model their efforts on the works of the project. For example, self-determination is a cornerstone of transition theory and these model demonstration projects should consider employing portfolios as a self-determining method of evaluation. Portfolios may increase the self-determination of a project's evaluation by helping staff to recognize and realize their potential, to increase their creativity in solving problems, to develop pride in their accomplishments, to become more assertive in their planning and decision making, and to increase their self-advocacy during the evaluative process (Ward, 1988). Additionally, as historical documents, portfolios serve 1) as a verifiable record for future policy making, 2) as a guide for identifying developmental issues and 3) as a template for replicating a model program.

Empowerment Evaluation

Fetterman (1993) has defined empowerment evaluation as using "evaluation concepts and techniques to foster self-determination" (p. 115). The goal of empowerment evaluation is to involve people in conducting their own evaluations. This new concept of evaluation encourages self-sufficiency by directly involving people in the evaluation process.

Empowerment evaluation is "problem focused, collaborative, and requires both qualitative and quantitative methodologies" (Fetterman, 1993, p. 115). A portfolio of activities uses both evaluative methodologies. It is qualitative in that it tells a story and quantitative in that it presents

measurable data. Another aspect of empowerment evaluation is that it is an integral part of program planning. Similarly, a portfolio serves as a planning tool by providing staff with a total picture of the project's progress through recording consumer demands and needs, project issues, and successful and unsuccessful strategies. This broad picture of a project presented by a portfolio may be of greater value in program planning than a separate review of individual objectives, activities, and strategies.

Portfolio Components

Portfolio Materials: Selection Criteria

Individual discretion is the criterion for selection and inclusion of portfolio materials (Paulson & Paulson, 1991a). The question of archival worth of the information is one of primary importance and should be used as one rule for selecting material. A portfolio of activities should help individual stakeholders gain an understanding of how the grant evolved and grew from the original grant proposal. The emphasis in using portfolios is on empowerment self-evaluation and should include items that may prove useful in the evaluative process.

The content, style, organization, and length of each portfolio are typically unique and will vary. However, there are elements common to all portfolios. These components provide a structure from which to build a table of contents for a portfolio of activities and are described below.

Foreword

A short summary of the portfolio's format and purpose should be presented as a foreword. Identifying the format style will orient the reader to the nature of the portfolio and will give the project staff a clear definition of the portfolio's purpose.

Introduction

A valuable component of the portfolio is a narrative of the grant. This narrative provides the reader with a history of the project and summarizes the work of the grant. Among the information that may be included in the project's narrative are historical perspectives and influences, major events, successful activities, problems, highlights, barriers to success, changes in the project's goals or objectives, and antidotal recommendations. The narrative provides the opportunity for including information that will not be presented elsewhere in the portfolio.

Grant Personnel

A list of all persons involved with the grant and an acknowledgment of the funding source should be clearly delineated. Personnel are the primary strength of any project. Listing all the people who have been involved with the grant over time gives readers a sense of the project's continuity and stability. It also provides a quick picture of the scope of the grant. For these reasons, the personnel list should include all stakeholders including principal investigators, project directors, part-time and full-time staff, evaluators, research assistants, student workers, and advisory committee members, and so forth.

Grant

A copy of the original grant and a list of the project's goals and objectives need to be presented in order for readers to be able to compare the initial intent and the final outcomes of the grant.

Evaluation Activities

A portfolio should include all formal and informal program evaluations. Descriptions of evaluation methods that the project uses and

of record keeping systems used to track progress towards meeting the goals and objectives of the grant should also be included.

Consumer Needs

Activities and assessments used to identify consumer needs, interests, and involvement are essential components of model demonstration projects. While consumer needs are made-up of data that cut across many elements of the portfolio, it is important to place those activities that clearly address consumer needs in a separate and distinct place.

Research Activities

Mailed and telephone surveys, literature reviews, and qualitative studies are examples of research activities. The design of research instruments, an explanation of how they were created and used, and a description and analysis of the data should be presented for each research effort of the grant.

Outreach Activities

Direct student services, technical assistance efforts, workshops, classes, and interactive computing programs are examples of both support and educational outreach activities. These activities are the heart of many projects and must be presented in the portfolio.

Network Activities

The types and amounts of network activities may determine whether a project has effected a change in the educational system. Recording the relationship betweer the project and other departments, offices, and institutions allows project staff to better evaluate their organizational role. Collaborative works, interagency cooperation, and interdepartmental agreements should be described in the portfolio.

Professional Meetings and Activities

Staff who attend conferences and workshops are disseminating information by networking with other professionals. A record of such activities identifies efforts to increase the staffs' professional growth and further defines the scope of the project.

Dissemination Activities

Include all program proposals, journal articles, newspaper and magazine stories, informational brochures, videotapes, multimedia activities, presentations to various groups, organizations, and associations and other dissemination activities in the portfolio. It is appropriate to include all dissemination efforts, both published and non-published, accepted and denied. This is a record of your efforts to disseminate information.

Planning Activities

Project staff may use a portfolio both as a recording place of planning activities and as a planning tool. In fact, a record of planning activities may facilitate future planning by enabling project staff to examine the effectiveness of past planning efforts, such as, the agendas of formal staff meetings and notes from informal staff interactions.

The purpose and intent of a grant will likely dictate the categories that will be included in a portfolio of activities. Presenting the above list is intended to show one successful scheme for categorizing the activities of a grant.

Advantages and Benefits of Using Portfolios

A portfolio of project activities demonstrates a natural movement towards self-determined evaluation. It is reasonable to believe that

project staff should employ empowerment methods for themselves even as they assist people with disabilities in becoming more self-determined.

While a portfolio will likely be very large at the end of three years, using a portfolio to document a project's activities has many advantages. Some of the benefits of using a portfolio of activities to record the works of a grant are presented below.

1. It is very enlightening to view an entire collection of information in one place. This warehousing of project activities helps one realize the full extent of a project's efforts, including its purpose, goals, objectives, failures, and successes.

2. A portfolio provides a directional road map for future efforts because the document clearly shows ups and downs, gaps and barriers, failures and successes in the overall progress of the grant. The utility of the portfolio rests in the extent that it captures these things.

3. Identifying those activities that have been undertaken but were not originally planned in the grant application or identified as being objectives of the grant reveals the nature and breadth of a project.

4. A portfolio provides project staff with a greater level of involvement and awareness when working with outside evaluators. They are able to exact more from external evaluators in evaluating a grant's efforts and in making more salient and effective recommendations. A portfolio truly "desensitizes and demystifies evaluation" by involving the project staff in their own evaluation (Fetterman, 1993).

5. The document can be easily condensed. The final portfolio may then be packaged and distributed to meet various audiences depending on their information needs. The distribution of the portfolio becomes a key dissemination activity.

6. A portfolio pulls together information for use in the final report.

7. A portfolio changes the relationship between the outside evaluator and the project staff. As the project staff become more actively involved in the evaluation, "the evaluator becomes more of a facilitator" (Fetterman, 1993, p. 116).

8. Finally, the inter-relationship of project activities is dramatically illustrated by a portfolio. This will become apparent as staff undertake the task of categorizing overlapping materials.

Summary and Recommendations

It is especially important that project staff have a working knowledge of the broad array of evaluation options available. A portfolio of activities is one such evaluation option that is flexible and empowering. This type of empowerment evaluation method is particularly useful as a needs assessment instrument for program planning, an inventory of project activities, and a historical record of the grant. Demonstration projects should consider using a portfolio of activities in order to serve as a self-determining model for individuals with disabilities.

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Abstract

A portfolio of activities is an action oriented process that allows staff to conduct a continuous, thorough, self-determining evaluation. The author uses a portfolio for recording and evaluating the works of a model postsecondary project. Using a portfolio for collecting, describing, and documenting a project's successes, efforts, and failures enables project staff to take-stock of their accomplishments to date, track their progress towards reaching stated goals or objectives, and foster an awareness of the fullness of their efforts. The author summarizes the key concepts of empowerment evaluation and self-determination to provide readers with a theoretical framework from which to operate, discusses selection criteria for inclusion of portfolio materials, and identifies the advantages and benefits of using a portfolio.